

An Investigation into Fundraising Initiatives that will Potentially
Impact Wisconsin Technical Colleges

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Abstract

As higher education institutions face a decrease in external funding, the need to identify alternative funding resources continues to be discussed. Historically, universities have dedicated a considerable amount of time and resources in the research and development of their fundraising initiatives. While university fundraising practices are well established, this is not the case with Technical Colleges. Fundraising is a relatively new approach that Technical Colleges are beginning to explore. There is no previous literature to specifically guide Technical College presidents efforts to increase fundraising. This study describes new fundraising initiatives that seven Wisconsin Technical Colleges presidents have implemented over the past two years, or plan on implementing over the next two years. The study utilized a qualitative descriptive method to provide a comprehensive summary of fundraising initiatives in everyday terms. Results indicated that presidents believe fundraising is a viable option to increase support for students and that they are ultimately responsible for their institutions fundraising success. Fundraising initiatives identified during the interviews focused on informing the communities of the need for student scholarships, developing active alumni, identifying alumni with the greatest giving potential, utilizing foundation board members and their acquaintances, and cultivating relationships and partnerships with business and industry.

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Chapter I

Introduction

There is little debate that higher education has significantly impacted the culture of the United States. Career and Technical Education (CTE), also referred to as Vocational Education, and Vocational Technical and Adult Education, has played an essential role in this development, by preparing individuals to meet the current and future workforce demands of our ever changing nation (Bushong, 2009; Gordon, 2003; Hawkins, Prosser, & Wright, 1951). However, the level of legislative and financial support for the development and maintenance of higher education institutions continues to cause concern (Wellman, Desrochers, & Lenihan, 2008). These issues become even more significant when financial shortfalls to institution budgets are experienced (Breneman, 2002; Bushong, 2009). With an increasing deficit at the national level; in addition to highly constrained budgets at almost all state and local government levels; an effort to increase institutional fundraising revenues for CTE education has recently drawn greater attention. Wisconsin's CTE colleges, officially referred to as Wisconsin Technical Colleges have been forced to look for alternative revenue sources to offset the decline of federal, state, and local funding. Yet, little is known about the current and future initiatives that may influence fundraising especially among leaders of technical colleges. This study seeks to further explore the important issue of external forces that influence fundraising in state post-secondary CTE institutions.

Overview of Wisconsin Technical College Revenue Sources

The Wisconsin Technical College System (WTCS) provided education to over 362,000 students in 2012 (Wisconsin Technical College, 2013). From the initial

development of trade schools in 1907, Wisconsin has been highly regarded as providing a model for technical education which other states often model (Wisconsin Technical College System Office, 2012).

The WTCS is funded through five primary sources. These sources include local, state, federal, self-financing operations and miscellaneous revenue, as well as tuition and fees. With a state deficit looming over Wisconsin, Governor Walker signed into law the 2011-13 budget that reduced funding by \$72,686,800 in General Purpose Funds, \$4,401,800 in Program Revenue Funds, and \$1,251,000 in Federal Aid (Merrifield, 2011). This was projected to reduce funds provided to the WTCS by more than 30%.

The decline in state funding occurred at a time when student tuition was at an all-time high accounting for 22.6% of the WTCS operating budget (Merrifield, 2011). At the same time local property values have continued to drop (Wisconsin Technical College System, 2010). The declining property values statewide also reduce the amount WTCS districts can levy through taxes from their districts. The amount of tax each property owner pays is based on the appraised value of their property and the current mill rate found in each of the WTCS districts. According to Stott (2005), “the state law limits property taxes levied by each WTCS district except debt service to \$1.50 per \$1,000 (or 1.5 mills) of the districts equalized property valuation, which is referred to as the operational mill rate” (p. 6). This issue is especially critical to the five Wisconsin Technical Colleges that are currently at the maximum 1.5 mill rate. In many ways the WTCS system is not unlike other higher educational systems focused on cost reduction and opportunities to raise additional revenues.

The previous sections provided a brief overview of the major revenue sources used by the WTCS to operate the 16 Wisconsin Technical College Districts. While these five categories noted above are considered to be the primary revenue sources for WTCS, the following section will provide additional insight into the role of alumni fundraising at Wisconsin Technical Colleges.

The Role of Alumni Associations and Foundations in Fundraising

All 16 Wisconsin Technical Colleges have an alumni association and an alumni foundation. While each alumni association and alumni foundation has a specific intended purpose, they have a strong connection and relationship between each other.

The Wisconsin Technical College alumni associations are responsible for the maintenance of the connection between the college and alumni. In addition, they function to develop and organize promotional events for alumni. They often have an alumni board made up of college staff, administrators, current students, and alumni. For example, the Northcentral Wisconsin Technical College Alumni Associations (2010), mission statement is: “The alumni association exists to support the mission of the Northcentral Wisconsin Technical College through developing a lasting and mutually beneficial relationship between the alumni and the college” (para. 1). It is worth noting there is no mention of financial support discussed in their mission statement.

The foundations of all Wisconsin Technical Colleges are in essence a separate entity from the colleges themselves. While each foundation has a different mission, the Northcentral Wisconsin Technical College (2010), has stated that it exists “to develop relationships that enable individuals, businesses, and the community to advocate for and provide resources in support of Northcentral Wisconsin Technical College to accomplish

its mission” (p. 17). There is an obvious overlap in key characteristics of the mission statements of Northcentral Wisconsin Technical College’s alumni association and its foundation. Each directly identifies relationships, alumni, and supporting of the college. However, a unique feature of the foundations is that they are non-profit organizations which are tax exempt. They generally have a foundation director and depending on the size and level of commitment of the institution, may have additional support staff as well. They also have a foundation board that often consists of college administrators, and local leaders from business and industry. The board’s duties involve the using of their unique abilities to maximize donations from potential donors. More specifically, the board focuses on strategies to obtain donations, decides how donations are to be dispersed, and oversees the effective management and investment of donations (Babitz, 2003).

Higher education institutions have elected to create foundations to provide a greater amount of freedom in the allocation and distribution of funds received (Bass, 2010). This autonomy allows the foundations to distribute donated financial resources without adhering to complex rules and legislation that often restricts how Wisconsin Technical Colleges may obtain and allocate funds. The donations raised by Wisconsin Technical College foundations are used to support multiple priorities including student grants, professional development, and any other cause that are related to the future development of the college and its students. Without this freedom, it is uncertain how the allocation of donated money would be distributed.

Statement of the Problem

This study will examine the lack of strategic planning concerning new and potential future fundraising initiatives at CTE colleges. The problem Wisconsin

Technical Colleges may encounter by not identifying fundraising initiatives is their inability to effectively maintain and create new programs that meet the changing needs of their students and the communities they serve. The long term social-economic impact of this continued failure could drastically influence the future advancement of Wisconsin Technical Colleges and their ability to make contributions to society.

Purpose of the Study

The purpose of the study is to describe new and potential future fundraising initiatives occurring in Wisconsin Technical Colleges. The researcher has described new fundraising initiatives that Wisconsin Technical Colleges have implemented over the past two years, and those that they plan to implement over the next two years.

Assumptions of the Study

The assumptions of this study are:

1. The presidents of Wisconsin Technical Colleges have sufficient knowledge to accurately answer the research questions in regards to fundraising.
2. The presidents of Wisconsin Technical Colleges will provide honest responses to the research questions.

Research Questions

The research questions for this study are:

1. What new fundraising initiatives have been implemented by Wisconsin Technical Colleges over the previous two years?
2. What potential fundraising initiatives are Wisconsin Technical College's planning on implementing over the next two years?

Significance of the Study

The significance of this study is that it provides a potential opportunity to increase future revenues at Wisconsin Technical Colleges by identifying specific initiatives in fundraising. The knowledge obtained from this study could be used by other types of non-profit organizations, for-profit organizations, and higher education institutions to develop systems that will increase their effectiveness and efficiency of identifying trends that influence fundraising. The study will specifically provide the presidents of Wisconsin Technical Colleges with a greater understanding of fundraising as well as the opportunity to reflect on the initiatives that may not have been previously considered to provide additional financial resources to their colleges.

The initiatives identified may also be used in future studies. With no previous research found that specifically addresses fundraising at CTE colleges, this research may also provide the necessary ground work for future research at Wisconsin Technical Colleges and CTE colleges across the nation. It is also important to emphasize CTE colleges are currently not required to submit all fundraising data to be statistically analyzed at the national level. This research may benefit CTE colleges nationally by identifying regional as well as broad demographical fundraising initiatives associated with fundraising.

The research will also provide further opportunities to compare and contrast these findings with the current fundraising literature at community colleges and universities. While these institutions are different in nature, this may contribute to the existing literature by identifying alternative fundraising initiatives at higher education institutions not previously explored.

Limitations of the Study

This study is limited to the Wisconsin Technical Colleges and the results cannot be generalized to other states and CTE college systems. It is also important to note this study will discuss future trends and initiatives. The environment is constantly changing and evolving. It is impossible to make future predictions that are entirely accurate. This study relies on the knowledge of a sample of experts to make predictions on future events.

Definition of Terms

The following definitions were used when designing this study. These definitions will also be provided to the presidents participating in the study.

Fundraising Initiatives: Key actions focused on achieving a specific objective or closing a gap between an institution's fundraising performance and its target.

New Fundraising Initiatives: Key actions focused on achieving a specific objective or closing a gap between an institution's fundraising performance and its target that did not previously exist at the institution.

Summary

The WTCS has been a leader in the history and development of CTE in the United States (Wisconsin Technical College System Office, 2012). Like most publicly funded institutions, local, state, and federal legislation has shaped the direction in which the WTCS has evolved. Through financial support and regulation, along with direction from the WTCS board and constituents, the WTCS continues to provide education to over 362,000 students (Wisconsin Technical College System, 2013). However, it is unclear how Wisconsin Technical Colleges will generate alternative funds, or reduce

costs to continue serving the state of Wisconsin and its communities. It is also unclear what new fundraising initiatives Wisconsin Technical College presidents plan on implementing in the future. By identifying these initiatives, Wisconsin Technical College presidents will have an additional resource to identify potential opportunities to increase fundraising.

The following chapter will provide a broad review of the literature and identify the knowledge gaps that currently exist. It will further explain how this study will attempt to fill these gaps. The chapter is divided into five sections. These sections are identified as: role of leadership in fundraising, resource development, alumni engagement, impact of technology on alumni fundraising, and fundraising trends in nonprofit fundraising organizations.

Chapter II

Literature Review

With growing concerns on how the Wisconsin Technical Colleges can create a sustainable financial plan, fundraising has been recognized as a potentially viable option to offset revenue shortfalls. Previous research has focused on the trends and issues facing institutions including the financing of higher education (Brooks, Joss, & Newsome, 1997; Cohen, 1993; Green, 1994). However, no research has specifically identified how fundraising could potentially impact CTE colleges. There is also research that has focused on the history and importance of alumni fundraising at universities and community colleges (Ingram, Haynes, Davidson-Shivers, & Irvin 2005). This chapter builds on previous research by identifying the most prevalent trends associated with fundraising initiatives at universities and community colleges, and further explains how these trends could potentially impact CTE college's efforts to increase fundraising.

Due to the lack of literature that specifically addresses fundraising at CTE colleges, a review of university and community college research was identified to provide insight into trends that may potentially impact fundraising at CTE colleges. While the nature of these institutions varies from CTE colleges, there is a need to identify literature that will provide additional insight into the future trends in fundraising at higher education institutions. The core literature selected for review draws on futures research and predictive tools to identify potential trends in fundraising. Due to the evolving economic environment, all core literature was written and selected from 2004 to 2014 to ensure the most current trends and fundraising initiatives were identified. However, a

broader range of literature beyond this time frame was also reviewed to provide additional context and depth to the topic of this paper.

The framework for this chapter is divided into four sections. The first four sections identify the trends that could potentially impact fundraising. These sections are identified as the role of leadership, alumni engagement, and the use of technology in alumni fundraising. The fifth section identifies fundraising trends in nonprofit organizations.

Role of Leadership in Fundraising

Leaders are often viewed as the most important factor in determining the success or failure of an organization (Boggs, 2003; Glass & Jackson, 1998; Hodson, 2010; Ryan & Palmer, 2005). According to Cook (1997), and Glass and Jackson (1998), university and community college presidents are viewed as the leaders directly responsible for the fiscal management and fundraising of their institutions. Their responsibilities include creating a compelling vision, setting institutional priorities, articulating the case for support, assessing institutional readiness, empowering constituents, inspiring donor confidence, investing in external relationships, encouraging faculty and staff participation, cultivating and soliciting gifts, as well as thanking and recognizing donors (Hodson, 2010). It is difficult to determine how these responsibilities have fluctuated over time. However, according to a report from the Community College Leadership Development Institute (2001), presidents at community or technical colleges have a very demanding and complex job which may be contributing to the shorter tenure in leadership positions. The future impact of these shorter tenure terms of college presidents on alumni fundraising is unknown, but presents another issue colleges may need to

address in the future. The following sections of this chapter analyze future trends identified in the literature which includes the professional development of presidents (Friedel, 2010; Satterwite, 2004), selection of presidents (Glass & Jackson, 1998; Hodson, 2010), team management (Glass & Jackson, 1998, Satterwite, 2004), and resource development (Glass & Jackson, 1998; Satterwite, 2004; Thomas, 2008).

Professional development of presidents. There is concern as to whether college and university presidents have adequate opportunities to pursue professional development opportunities. According to Satterwite (2004), there are very limited educational opportunities for presidents to gain adequate knowledge to address the critical issues and challenges of fundraising campaigns. Presidents are often times forced to fine tune their own skills in order for them to succeed. These skills are identified as the understanding of all operational and financial functions, communication skills, motivation skills, and the ability to establish and develop relationships with key donors (Satterwite, 2004). One device to address this issue is to provide an educational degree that is more closely aligned with the challenges previously listed. This issue was further explored in a study conducted by Friedel (2010), which indicated there were an insufficient number of qualified individuals to replace the future leaders in California community colleges. The designing of an Ed.D. cohort program that is both accomplishable and specifically designed to provide the necessary attributes for presidents to be successful was identified as desperately needed (Friedel, 2010). It was also suggested that a three-year program that focuses on the necessary knowledge, skills, and abilities future community college leaders will need is critical to ensure qualified candidates will be able to meet the future demands of these institutions.

In summary, it is unknown if Wisconsin Technical College presidents have received the necessary skills needed to be a successful president in fundraising. This research seeks to provide a greater understanding if there is a need to provide Wisconsin Technical College presidents additional professional development to be successful in fundraising. It may also identify training resources Wisconsin Technical College presidents feel are essential to their future success in fundraising. The following section expands on professional development by further analyzing the importance of selecting a president that is right for the institution.

Selection of presidents. The selection of a college or university president can be a challenge for any higher education institution. Presidential leadership is necessary to assist with the strategic planning of the mission, policies, and financial structure of the institution (Hodson, 2010). When selecting individuals to fill the role of president, it is increasingly important that candidates view fundraising as a significant part of their job and ensure that adequate time and resources are dedicated to the facilitation of alumni fundraising (Glass & Jackson 1998; Hodson, 2010; Ryan & Palmer, 2005). According to Glass and Jackson (1998), the success in fundraising at community colleges will ultimately depend on the president's capacity for leadership. Cook (1997), expanded on this idea by stating fundraising is not only necessary, but it now an expectation of presidents. This was also reiterated by Hodson (2010) and Shaw and Shaw (2008), who stated that fundraising is viewed as a measure of the president's effectiveness and a clear understanding of the expectations is essential. A lack of knowledge in successful fundraising practices is often viewed as the downfall of many higher education presidents (Cook, 1997).

The strategy or criteria that higher education institutions use in the selection process differs greatly between institutions. However, in the current economic environment it may now be even more important to select a president who matches the institutions mission, goals, and is familiar with the culture at the institution to the potential donors. This study will explore this issue further by identifying similarities and differences in the Wisconsin Technical College president's views on fundraising. By doing so, it will provide the presidents and CTE colleges the opportunity to reflect upon what skills and characteristics may be associated with the selection of CTE presidents and its impact on fundraising. To effectively facilitate the fundraising process, the literature emphasizes a team of individuals is necessary. The following section explains the importance of team management in fundraising efforts in higher education institutions.

Team management. Recent studies have placed a higher emphasis on the president's role in team management (Satterwite, 2004; Stevick, 2010). This is also true with the president's role in creating successful fundraising programs. According to Satterwite (2004), while university presidents are most notably recognized, fundraising is a shared responsibility among a large group of institutional leaders. In order for a fundraising campaign to be successful it requires a collaborative effort involving presidents, trustees, volunteers, and foundation directors (Glass & Jackson, 1998). It is also worth noting that involving department staff in the strategic planning of the campaign is critical to the future success of the institution. This potentially increases the individual sense of belonging and investment into the process. This is especially true when individuals or organizations are potentially giving a large gift (Satterwite, 2004).

Potential donors want to feel their donation is appreciated and going to be used in a manner that is satisfactory to the institution as well as their own interests. The following section expands on team management by addressing trends associated with resource development in fundraising.

Resource Development

Presidents are the primary force behind fundraising campaigns and they must establish a strategic plan in relation to the vision of the university while also effectively communicating this plan (Glass & Jackson, 1998; Satterwite, 2004; Shaw & Shaw, 2008). It is essential that presidents ensure the needed resources are in place for the development and implementation of fundraising initiatives. This includes an efficient chief development office, experienced capital campaign personnel, and the support from university foundations and alumni organizations before starting their fundraising project (Satterwite, 2004). The number of dedicated staff may be an indicator of fundraising performance. This is also supported by Glass and Jackson (1998), who suggested a direct correlation between fundraising success and the level of expenditures dedicated to staffing.

With no previous research or statistical data available to determine what exact resources Wisconsin Technical College presidents have dedicated to fundraising, this study will seek to identify the current state of resource development. It will also provide insight into what resources are prioritized by Wisconsin Technical College presidents to address future trends in fundraising. Furthermore, it will provide a greater description of potential opportunities to acquire and implement the necessary resources needed to be

successful. The following section elaborates on the strategies and trends used to engage and cultivate potential alumni donors.

Alumni Engagement

The challenges associated with alumni fundraising in higher education have existed for some time (Glass & Jackson, 1998; Jones, 2010; Satterwite, 2004). Strategies for increasing alumni fundraising have continued to change and evolve. The most recent trends found in the literature suggest the need for institutions to focus their efforts on cultivating alumni (Jones, 2010; Satterwite, 2004; Shepard, 1996; Skari, 2011). Creating a culture that promotes the likeliness that alumni are willing to make financial contributions to their alma mater involves several steps.

According to Shepard (1996), the cultivation of alumni involves the following three steps. The first step requires institutions to identify and determine the capacity of potential donors. Having a greater understanding of this will allow institutions to better target fundraising efforts. The identification of demographic variables such as older alumni in general (Satterwite, 2004; Skari, 2011), and even more specifically older female alumni (Sun, Hoffman, & Grady, 2007), have been reported as leading to increased fundraising success at institutions. Lastly, according to Weerts and Ronca (2009), “alumni with household incomes over \$90,000 are more likely to give, and give at higher levels” (p. 114). These are examples of several demographic factors that were found to have the greatest opportunity for increasing alumni fundraising.

The second step is to develop a strategic plan to cultivate alumni donors. There are numerous ways that institutions can engage alumni if the institution develops a strategic plan to address both the institutional and alumni needs. According to Jones

(2010), effective strategies for donor cultivation will result in “success in annual giving, major giving, planned giving, public and private grants, and other fundraising and advancement efforts” (p. 19). The cultivation of alumni donors included in the literature includes the need to enhance services based on alumni needs (Sun et al., 2007), and informing alumni donors of the institution’s need for alumni support (Weerts & Ronca, 2009).

The third step is to effectively communicate with the alumni. There are multiple challenges associated with this issue. These challenges include alumni association membership (Newman & Petrosko, 2011), comprehensive communication strategies (Sun et al., 2007), and cultivation of alumni through special events (Jones, 2010).

It could be argued that CTE colleges may be at a disadvantage in alumni engagement due to the limited amount of time and activities that two year college students are likely to engage in during their program. However, it is still unknown what strategies, if any, Wisconsin Technical College presidents have implemented to encourage alumni engagement. This study will seek to identify what actions the president’s plan to implement to encourage alumni engagement and fundraising in the future, in comparison to the trends identified in the literature such as informing the public of the need for funds, strengthening relationships with community leaders, increasing communication with alumni, establishing alumni associations, and the identification of alumni donors who are most likely to give. This comparison will allow Wisconsin Technical College presidents to further identify opportunities to increase alumni engagement and consider eliminating those that are viewed less successful. One trend identified in the literature to assist with alumni engagement is through the

implementation of technology. The following section will expand on the identified trends and its potential impact on alumni fundraising.

Impact of Technology on Alumni Fundraising

It is widely accepted that technology has drastically impacted higher education (Chilcote, 2009; Dolbert, 2002; Moore & McLaughlin, 2007). However, it is not clear what new technology will be used to potentially aid alumni fundraising in the future. The ability to communicate with alumni was identified as having the greatest potential in alumni fundraising (Dolbert, 2002). In a review of literature, two forms of technology were highlighted as having the greatest impact on alumni fundraising in the near future.

The first technology identified incorporated permission based email campaigns (Moore & McLaughlin, 2007). The results of this study showed older females perceived the emails sent from the alumni association more positively, alumni that viewed themselves as less involved with alumni activities viewed the emails less positively, and although alumni elected to receive permission based emails, that alternative methods should also be explored.

The second technology identified was the use of blogs and social media tools to start and maintain communication with alumni. Social media have increased in popularity, but many institutions are struggling to effectively use the technology appropriately (Chilcote, 2009; Masterson & Carew, 2010; Stevick, 2010). It is uncertain if these struggles may be attributed to inadequate personnel, financial resources, or additional barriers not yet identified.

The potential use of technology for alumni fundraising in CTE colleges is already apparent. A significant number of colleges have implemented email campaigns, and

created social networking sites for their institutions. However, there are still challenges related to the use of technology for alumni fundraising that Wisconsin Technical College presidents may need to consider in the future.

In summary, this study sought to address the knowledge gap in regards to the role of technology and its influence on future trends of alumni fundraising at CTE colleges. It is important to determine what trends will provide Wisconsin Technical College presidents the greatest amount of effectiveness and efficiency in the communication and solicitation of alumni funds. A greater understanding of how Wisconsin Technical College presidents view technology in relation to the solicitation of alumni funds may have a significant influence on how CTE colleges allocate funds to personnel and new technologies. As previously discussed, technology has and will continue to impact the way in which fundraising is conducted. However, higher education is also known for not having the ability to respond to environmental factors as quick as other organizations (Drew, 2010; Morrison & Mecca, 1989). It is for this reason the following section identifies several fundraising strategies to add depth and context to trends identified in nonprofit organizational fundraising.

Fundraising Trends in Nonprofit Fundraising Organizations

Much like higher education institutions, nonprofit fundraising in nonprofit organizations has also been challenged with loss of revenues during difficult economic times. The loss of government funding and reduction in donor contributions continue to influence an already difficult environment (Reiss, 1989; The Urban Institute, 2011). Historically, individual giving accounted for 75 percent to 80 percent of donations to nonprofit organizations (Reiss, et al., 1989). Unfortunately, individual donations are also

the most likely to be affected during recessions. With the many challenges that nonprofit organizations will be encountering during difficult economic times, such as the recent recession in the United States, it is necessary for nonprofits to be creative in addressing their future program services (Archibald, 2009). The following section will explain two recommendations that offer the greatest potential and challenges for fundraising in the near future.

The first recommendation identified in the literature focused on institutions that use online fundraising with a suggestion that they should direct their efforts on communication with individuals and converting this connection into action (Jamieson, 2009). According to Guidestar (2010), the second recommendation for nonprofit organizations is to be cautious about activities such as board giving, corporate gifts, telephone, payroll giving, and planned giving because they yielded very little or no increase in 2010. It remains unclear to what degree Wisconsin Technical Colleges have connected with their community members; alumni; business executives; and what actions yielded the greatest benefits in fundraising to their colleges. However, this study will seek to compare the trends in nonprofit organizations with actions in the Wisconsin Technical Colleges. This may provide further insight into strategies that will identify what the potential donors are most concerned and interested in when making donations.

Summary

The purpose of this chapter was to review existing literature to identify trends that will potentially impact fundraising in Wisconsin Technical Colleges. This chapter offered insight into trends and initiatives that other higher institutions have used in their attempt to increase fundraising donations. Fundraising may not be capable of solving the

financial shortfall that CTE colleges are experiencing, but it does provide another revenue source that is often utilized in university and community college institutions.

Chapter III

Method

The purpose of the study is to describe new and potential future fundraising initiatives occurring in Wisconsin Technical Colleges. The researcher has described new fundraising initiatives that Wisconsin Technical Colleges have implemented over the past two years, and those that they plan to implement over the next two years. Presidents of the Wisconsin Technical Colleges were selected as the most appropriate data source for this study because of their knowledge, leadership, and ability to implement organizational initiatives. The central questions of this study are:

1. What new fundraising initiatives have been implemented by Wisconsin Technical Colleges over the previous two years?
2. What potential fundraising initiatives are Wisconsin Technical Colleges planning on implementing over the next two years?

A qualitative method was selected for this study. The complexities of leading an institution of higher education provide a difficult challenge to identify specific variables that can be quantifiable. It is for this reason that qualitative research is regularly used to further research educational institutions (Tesch, 1990). This study seeks to provide a comprehensive summary of fundraising initiatives in everyday terms. According to Sandelowski (2000), a “qualitative descriptive study is the method of choice when straight descriptions of phenomena are desired” (p. 339). Due to the lack of research and the possible benefits this study may provide the Wisconsin Technical College presidents and other CTE institutions; I felt the descriptive qualitative method was the most appropriate research approach to identify new fundraising initiatives.

A qualitative descriptive approach provided an opportunity to gather rich data that describes Wisconsin Technical College president's experiences with fundraising. Other methods such as ethnography, grounded theory, and phenomenology would not allow me to effectively write a rich description of the Wisconsin Technical College president's experiences and interactions with various fundraising initiatives in an easily understood language. These methods are more concerned with broad descriptions, theory development, and interpretive meaning of an experience (Sullivan-Bolyai, Bova, & Harper, 2005).

Design of the Study: Overview

This study consisted of three phases. The first phase included conducting a preliminary literature review of related literature that may offer greater understanding of the potential fundraising initiatives that may be implemented at Wisconsin Technical Colleges. According to Morse (1994), it is often suggested to delay a review of the literature until after the data is gathered to avoid any potential unintended influences. My rationale for conducting a brief literature review is based on my limited time to speak with Wisconsin Technical College presidents and to provide enough contextual background to identify potential gaps in the literature as well as assist with the organization and identification of potential themes from the interviews. The descriptive qualitative research method does not typically utilize a theoretical framework to influence the structure and language when analyzing the data (Sandelowski, 2000). Instead this method focused on the actual words and descriptions from the Wisconsin Technical College presidents and less on my interpretations of the interview responses.

The second phase involved a semi-structured interview of the presidents from Wisconsin Technical Colleges. The interviews were intended to provide enough information to answer the research questions. While I will try to avoid high levels of interpretation, some interpretation was necessary to identify themes from the interviews and their relationship to the research questions. I then constructed a meaningful summary of the events in everyday language of the participants.

The third phase involved the analysis and reporting of the findings using the data gathered from the interviews. The data obtained from the interviews was inputted into tables and matrix to be analyzed utilizing the six analytic strategies outlined by Miles and Huberman (1994). This assisted my efforts to not only document the responses, but organize them in a visual manner. The following section will provide greater depth and additional context to the selection of participants and selection of questions that were utilized in this study.

Selection of Participants

There are currently 16 Wisconsin Technical Colleges and each college has one president. The president was selected as the most suitable respondent for this research because of their knowledge, leadership, experience, and ability to implement organizational initiatives. It is very difficult to predict the number of presidents that will be willing to participate in this study. According to Sandelowski (2000), qualitative descriptive research should apply a maximum variation sampling to explore the common and unique manifestations of the target phenomenon. To obtain an adequate response all 16 Wisconsin Technical College presidents were invited to participate. This was accomplished through a letter sent by mail including a request to participate document

and a copy of the consent form to participate in the research study. A phone call was also scheduled approximately one week after the mailing of the request to participate in this research study to answer any questions or concerns they may have. Each president was instructed they may choose not to participate or terminate their participation in the study at any point in time. Only presidents that sign and return the consent form will be allowed to participate in the study. Once consent forms were received, a request was sent by email to confirm a date, time, and method in which the interview took place.

Selection of Questions

A review of university and community college literature revealed internal and external environmental variables such as economic, cultural, political, leadership, and technology as potentially providing insight into trends and initiatives in fundraising. However, no research specifically addressed how these trends would possibly impact CTE fundraising. According to Sandelowski (2000), it is suggested that descriptive qualitative research use semi-structured interview questions and an open-ended interview guide to encourage participants to respond freely. For this reason, the questions selected for the descriptive qualitative study were designed to be left open interpretation by the responding Wisconsin Technical College presidents. This will allow the presidents to have the freedom to identify new and potential future fundraising initiatives.

According to Astedi-Kurki and Heikkinen (1994), basing the interview questions on the research questions is critically important. For this reason, the exact research questions were included on my interview guide. However, Creswell (1994), also stated the importance of the interviewer to focus on being a listener rather than a speaker and consider additional questions as the interview takes place. To address this issue I was

very conscious of utilizing the interview guide and only asking questions while limiting all other responses during the interview process.

Data Collection

According to Sandelowski (2000), qualitative descriptive studies are generally focused on “discovering the *who*, *what*, and *where* of events or experiences or their basic nature and shape” (p. 338). The techniques for the data collection typically include minimally to moderately structured open-ended interviews and/or focus groups (Sandelowski, 2000). A letter sent by mail including a request to participate document and a copy of the consent form to participate in the research study was sent to all 16 Wisconsin Technical College presidents during the summer of 2013. A phone call was also scheduled approximately one week after the mailing of the request to participate in this research study to answer any questions or concerns they may have. A total of seven Wisconsin Technical College Presidents agreed to participate in the study. I intended to conduct individual face-to-face, Skype, or telephone interviews based on the preference of the presidents to participate. All presidents elected to conduct interviews by telephone. The telephone interviews were scheduled to occur over a 3 month period. Each president received a letter including the interview guide that was utilized during the interviews. The guide was designed to be minimally structured and open-ended to allow the freedom necessary for the presidents to explore themes as they become apparent. Sandelowski (2000), stressed the importance of the researcher to “stay closer to their data and to the surface of words and events” in comparison to other qualitative methods such as grounded theory, phenomenology, or narrative studies (p. 336). Interviews were conducted until the data obtained from the interviews reached saturation. Saturation was

reached when no new themes are observed and a comprehensive description of the new and potential future fundraising initiatives was explained in common language. The estimated time to complete each interview was 60 to 90 minutes. All interviews conducted fell within the expected time frame. Each president interviewed was asked if they may be contacted at a later point in time for follow-up questions if I feel additional themes need further exploration. All presidents agreed to this terms. Approximately 1 to 2 weeks after the interviews took place, a summary of my interpretation of their responses was emailed to each of the presidents that participated in the study. This allowed the presidents to add additional comments or to make changes they felt were necessary to the data I collected.

It is important to recognize the challenges that were occurring in the state of Wisconsin during the data collection process. Beginning in February 2011, individuals began protesting legislation that limited collective bargaining rights of public employees as well as budgetary reductions to the state's education operations budget. These protests are still ongoing. Actions such as solidarity sing-along's and gathering inside the capitol have continued to occur on a daily basis. Hundreds of protestors have been arrested and tensions between communities, educational institutions, and politicians has created a tense environment. However, it is unknown to what degree this tension has impacted relationships between college presidents and state legislators. It is also unknown the potential impact it may have on the presidents' participation in this study.

Data Analysis

The following steps were used to analyze the qualitative data obtained from the interview. Sullivan-Bolyai, et al., (2005), suggested qualitative descriptive studies utilize

the six analytic strategies outlined by Miles and Huberman (1994). These strategies are described as:

1. Code data collected from observations and interviews
2. Record insights and reflections on the data
3. Sort through the data to identify similar phrases, patterns, themes, sequences and other important features
4. After sorting, extract commonalities and differences for further consideration and analysis
5. Gradually decide on a small group of generalizations that hold true for the data
6. Examine these generalizations in light of knowledge that is known.

Following the suggestion of Miles and Huberman (1994), all data was inputted into tables to allow visual and contextual interpretation of the data. While these tables were developed to allow full interpretation of the data, qualitative descriptive research focuses on low-inference as opposed to high-inference utilized in other qualitative methods. Sandelowski (2000), further emphasized that qualitative descriptive studies require “no mandate to produce anything other than a descriptive summary of an event, organized in a way that best contains the data collected and that will be most relevant to the audience for whom it was written” (p. 339). The next section will further explain how I collected the data in this study.

Summary of Data Collection

All seven presidents that participated in the study were asked to provide responses to the interview questions outlined by the semi-structured interview guide. The semi-structured nature of the interview resulted in the elimination or addition of questions as the interviews were conducted. Prior to the start of the interview a reminder that all responses from presidents will be screened for individual identifiers was communicated to the presidents. Responses containing individual identifiers were altered or removed from the president's responses during data analysis. Once I acquired the necessary data, the presidents were asked if they have any questions or concerns and thanked for their participation in the interview. A summary of my interpretation of their responses was emailed to each of the presidents that participated in the study. This allowed the presidents to add additional comments or to make changes they felt were necessary to the data I collected.

Ethical Issues

The research instrument and description of the procedures for this study was submitted to University of Minnesota Institutional Review Board for approval. A consent form was created that explains in detail that participants are able to exit the study at any point in time. This form was individually mailed to all panelists prior to the research taking place. The document also had instructions on how to seek professional assistance for any physical or emotional harm they experience. This study utilized a purposeful sampling. Once the interviews were conducted, all personal identifiers were removed from their responses to preserve the anonymity of the subjects.

Reliability and Validity

The results of this study are limited to the Wisconsin Technical Colleges and will not be generalized to other states and CTE college systems. This qualitative descriptive study provided an opportunity to gather rich data that describes Wisconsin Technical College presidents' experiences with new and potential future fundraising initiatives. The external validity for this study relied on having an adequate sample size to allow the findings to be generalizable to all Wisconsin Technical Colleges. I believe having seven of the 16 presidents participate in the study assisted with strengthening the external validity for this study. In qualitative research the number of participants is viewed as less important as the quality and richness of the data (Creswell, 1994).

To increase the internal validity of this study it is suggested that inaccuracy, incompleteness, or discrepancies in the data are continuously monitored (Maxwell, 1996). This was addressed through the reading of multidisciplinary literature. By identifying literature from multiple disciplines it provided me the necessary information and background to identify and address these issues. To assist with the validation of the semi-structured and open-ended interview questions, a copy of my interview guide was discussed with my research advisor to identify and address any issues or concerns such as clarity, comprehension, and confidentiality that may affect the internal validity as well.

Summary

This chapter provided an overview of descriptive qualitative method that was used in this study. The chapter also included a detailed account of the selection of participants, sampling procedure, and the data collection and analysis procedures. Additional considerations such as potential ethical issues and the steps that will be taken

to increase the validity and reliability were also discussed to provide a greater understanding of the possible risks associated with this study.

Chapter IV

Findings

The purpose of the study is to describe new and potential future fundraising initiatives occurring in Wisconsin Technical Colleges. The researcher has described new fundraising initiatives that Wisconsin Technical Colleges have implemented over the past two years, and those that they plan to implement over the next two years. The research questions for this study are:

1. What new fundraising initiatives have been implemented by Wisconsin Technical Colleges over the previous two years?
2. What potential fundraising initiatives are Wisconsin Technical Colleges planning on implementing over the next two years?

The following is a summary of fundraising initiatives that seven Wisconsin Technical College presidents have implemented over the past two years or that may be implemented over the next two years. This study sought to provide a thorough description of these initiatives by using interviews to identify themes that have been obtained through interviews. Each interview was transcribed and coded to identify comments for similarities and differences in participating president's responses. By grouping and organizing all of the president's comments together, themes were identified and used to describe the president's views on fundraising initiatives. My intent was to stay as close to the words used by the presidents as possible. The qualitative descriptive method was used to summarize each president's comments and provide a comprehensive description of the president's comments, as well as describe the comments in everyday terms that readers can understand.

The framework for this chapter represents the individual themes collected from the interviews. Each theme includes a detailed description of the presidents' comments, as well as my interpretations that describe each theme.

Theme One: Ultimately Responsible for Fundraising Success

To gain insight into the organizational leadership of the technical colleges I asked presidents to identify who they felt was predominately responsible for leading their college's fundraising efforts to achieve success. One president stated "I feel ultimately responsible for the overall success of the college which would include fundraising." This stance was also apparent from the remaining presidents as well. However, there were some differences of opinions in regards to who is predominately responsible for leading their fundraising efforts. Two presidents described how they are predominately responsible, but they also believed it is a team effort. Although it is viewed as a team effort, one president stated "I am less involved in grants under \$10,000" which may further explain why a team effort may be needed to accommodate a wide range of fundraising donations.

Four of the presidents indicated they are equally responsible along with their foundation directors. One president stated "I am much more of a supportive figure encouraging them in their efforts rather than actually having boots on the ground. The foundation director interacts with the vice president, deans, and the faculty around specific fundraising projects." In addition, these four presidents further indicated that they utilized their foundation directors as their primary resource for identifying and coordinating their fundraising efforts. The presidents displayed great confidence in the individual's they had selected to lead their fundraising efforts.

One of the presidents stated that her foundation director is predominately responsible for fundraising efforts. However, that president also stated “one of the many roles of the president is to look for any types of funds that come into the college...my foundation director is responsible for identifying appropriate meetings to meet with potential donors.” Although the foundation director was viewed as predominately responsible for coordinating her efforts, the president also felt directly responsible and involved in the colleges fundraising efforts.

Theme Two: Adequate Staffing

During the interviews, I wanted to obtain greater insight into the organizational fundraising capacity of the technical colleges. Several questions were developed to provide further understanding of their current staffing levels and the education and professional development opportunities utilized by their employees.

Four of the seven presidents indicated they felt they were adequately staffed and trained to achieve their fundraising initiatives and fundraising capacity. There were some varying degrees of confidence as presidents answered this question. For example, one president stated “I think we are positioned well in terms of the number of staff that we have in development related roles.” Another president stated “I believe we are adequately staffed, but I may need to add more staff if I continue to increase fundraising goals.” These may be compared to one president that stated “Absolutely, we are adequately staffed. I attribute this to the outstanding Foundation Director.” In talking to the presidents who felt they were adequately staffed, they all held great confidence in the individuals they had working for them. However, several of these presidents also expressed concerns in regards to the staffing in the near future. One president stated “I

am very concerned with the retirements of key roles relative to the fundraising development at the college in the next few years.” Another president also expressed a similar concern stating “It is not typically something you can just hire out for because it is a community college setting and requires a relationship building process.” These responses describe how important key individuals can be to the success or lack of in regards to fundraising.

Several presidents indicated that they had concerns in regards to the number of fundraising staff currently employed, as well as the level of training their staff has received. One president stated “I think we could benefit from some additional help and resources.” That president went on to describe how an additional person who would assist in the organization and planning of their fundraising efforts would be very beneficial. Another president stated “I am hoping to add one more full-time staff in the near future somehow or someday. Some of my employees are very good at grant writing, but the idea of asking for cash is more difficult for them.” This president further stated “It is possible that some cultural influences may be partially responsible for this.” This seems related to another president’s statement “It is not typically something you can just hire out” implying it takes appropriate personality traits and time to build relationships in these types of positions.

Something that is not taught. When presidents were asked to describe new educational or professional development opportunities they or their staff has participated in over the last two years, a common theme was “none.” However, all presidents stated they will continue to send their fundraising leaders to conferences sponsored by the Association of Community Colleges and the Council for Resource Development. These

organizations were viewed as the primary resource for identifying future trends in fundraising. As one president stated “We will continue with this because this is something that is not taught, so you have to self-learn how to do fundraising and especially relationship building.” This sentiment was shared by other presidents as well, although I did not follow-up with this line of questioning with them. It was very apparent the feedback presidents were receiving from individuals attending these conferences was very positive and that their commitment to continue with these conferences was well established. One president further described “We will be expanding it to include more of our executive leadership team including our provost.” In contrast, the remaining presidents indicated they will continue to send the same number of individuals to these conferences in the future.

Theme Three: A Great Story to Tell

Historically, one of the oldest means of communicating between individuals has been through the telling of stories. For thousands of years, humans have passed stories down from generation to generation. In this study, all of the participating presidents discussed the importance of telling stories and communicating the positive impact the technical colleges have on individuals and the communities that they serve. As one president stated “it appears that the local communities may not be fully aware of the benefits technical colleges provide the communities and it’s a story that they have never heard.” This was reiterated by another president who stated,

Well, I think it’s probably true at all colleges as they focus on the skills shortages. Everyone is looking for workers and so there is a great story to tell about the role of colleges...the type of training we do is community

based type of training that works really well for us and sends a strong message for why people should support us. Our graduation rates and our placements rates within our community demonstrate that people are getting jobs within our communities. That tends to work real well for us as far as peoples interest and support and I think it's a great story to tell and getting that message out there is something that our community is hungry to hear about.

Throughout the interviews words such as urgency, need, dedication, and commitment were often associated with each president's desires to tell the "great story" of how technical colleges have impacted the community and the need for increased fundraising. As one president stated it almost feels "evangelical" at times when telling this story. One president described some potential reasons for this. Racial barriers, high unemployment and poverty were several of the barriers that were stated throughout the interviews. Another president stated "we may be the last, best chance individuals have of ever getting out of poverty." There was both a sense of confidence and determination in all the presidents' voices when discussing their daily efforts in sharing their stories.

Theme Four: Support for Students

I asked all presidents to describe what they believed the purpose of fundraising was at their college. The overall consensus was to provide support for students. This was further described as providing scholarships for students. As one president adamantly stated "The overall purpose is to increase opportunities for students to come to college and relieve the financial burden that many students face and to ensure success once they come there." Presidents then indicated areas such as educational program support, facility

projects, and staff support are also emphasized as these may not otherwise be available through local, state, and federal funding programs.

Several new initiatives to support students implemented by presidents over the past two years included an increase in the amount of scholarships given out, and emergency funds. Several presidents described how the act of giving out scholarships may be viewed as providing a greater incentive for these students to give back to the college once they have obtained financial stability. Emergency funds were described as small amounts of money that are given out to students who may be experiencing a short-term financial hardship that may prevent them from participating in college. The presidents were very excited and enthusiastic about the potential impact these initiatives will have on future fundraising efforts.

One president described an initiative that his college is planning on implementing over the next two years to further support students. The president described this initiative as “the identification of at risk students who owe small amounts of money to the college.” The president further explained how many students continue to drop out of college just short of earning their degree. This was often attributed to students not having the necessary funds to pay for small amounts of tuition or fees. The president explained that by identifying these individuals and helping them earn their degree, it provides greater opportunities for the individuals as well as the college.

Barriers encountered for student support. One barrier presidents identified to obtaining support for students was the ability to overcome the negative perceptions of publicly funded institutions. As one president stated that “sometimes companies and individuals think that they’ve already contributed and supported the college through their

property taxes.” One successful example of overcoming this barrier was a college that passed a 65.5 million dollar capital tax referendum in 2012. The president described one method to overcome this barrier as:

We just have to continue to make the case for the need and the growing need to address some of the challenges that we’re dealing with. The importance of a demonstrating that it is a “win-win” situation for all individuals and all people will get a return on their investment was also described as being very important.

The president further explained this was a team effort to accomplish this task. However, it also demonstrated the general public is dedicated to ensuring the educational needs of the community are being met.

Theme Five: Cultivating Relationships and Partnerships

While there were differing opinions regarding who is predominately responsible for leading the fundraising efforts and initiatives at the colleges, all presidents were in agreement in regards to the importance of a president’s role in cultivating relationships with potential donors. One president indicated, “My role is cultivating relationships and overseeing the process” allowing fundraising staff to identify potential donors. Another president expanded on this thought by stating “My primary focus when fundraising is on relationship building, community involvement, and developing a rapport with potential donors.” Community involvement and awareness were apparent in all presidents’ responses. Several levels of involvement and awareness existed where the cultivation of potential donors took place. One president stated “Our efforts directly align with the success of our students...It involves recruiting retaining and getting them to complete

their program.” A president further identified “The empowerment of a whole group of people including staff, deans, faculty, and vice presidents plays a pivotal role in creating those resource partnerships.” Lastly, a president noted that “Listening along with our Board of Trustees and identifying key partnership opportunities and resources that are in the community” is of critical importance to presidents. Presidents consistently referred to the importance of cultivating relationships with potential donors throughout the interview process.

Presidents’ time. Presidents were asked to explain what initiatives tend to be involved in the cultivation of relationships with potential donors. One common theme was related to the tremendous amount of time that is required in cultivating potential donors. When presidents were asked if the amount of time they spend fundraising would increase over the next two years, all presidents responded “yes.” While presidents were reluctant to estimate a percentage of time spent on fundraising, five presidents provided estimates that ranged from 5% to 20% of their time is dedicated to fundraising. As one president stated, “It is difficult to define, as many things you do are indirectly related to fundraising for the college.” The presidents were then asked if they felt they had allocated adequate amounts of time to fundraising. Four of the presidents stated “There is never enough time.” This was further illustrated by one president who stated, “I think every time I eat lunch in the school cafeteria without a potential donor is a wasted opportunity.” This may be a good example of presidents’ dedication to increase fundraising and to provide their students educational opportunities through scholarships.

The three remaining presidents indicated they “have adequate time for fundraising.” However, it may provide some insight in regards to how much time they

have in their daily schedules dedicated to fundraising. For example, one president stated “It is all about being able to balance the many things that a president does.” Another president also stated “Somehow I will make additional time to address fundraising in the future.” Reflecting back at these responses I would have liked to have asked each of the presidents if they specifically dedicated time to fill their weekly schedule for fundraising or if it is dealt with on a situation by situation basis. This might have provided a greater understanding of the amount of time presidents dedicate to fundraising.

Theme Six: Develop Active Alumni

When the presidents were asked if they had created any fundraising initiatives over the past two years, five of the seven presidents indicated they had taken steps to develop active alumni. The primary tool for accomplishing this was through their alumni associations. For one president, this initiative was to get their alumni association formed and “to start communicating with them as they hadn’t had a formal alumni group at the college.” While other presidents were not starting new alumni associations, the majority of the presidents shared similar views that their alumni associations were “still in the development stage.” It appears the central focus of this development is on creating databases with alumni names, home addresses, and email addresses in an attempt to re-establish communications and begin to create a dialog with their alumni. As one president stated “this is fairly new for the colleges to think this way, but we are transitioning to that kind of thinking.”

Developing alumni databases. The presidents identified several possible initiatives that may be implemented over the next two years. These initiatives were designed to increase the overall alumni database, to target specific alumni, and to provide

additional incentives for the alumni. The majority of the presidents were adamant about the importance of increasing and engaging more of their alumni. Some higher education institutions have utilized third party alumni search companies to assist in the identification of those alumni who were deemed most likely to make donations to the college and overcome this barrier. Of the seven presidents interviewed, only one college utilized a third party company which identified 40,000 alumni. This list is now being further analyzed to identify potential donors who are considered most likely to make donations. One additional college was also considering using a service like this in the future. The primary reasons for the presidents utilizing companies was “We’ve never identified our alumni. There are people who are still in the community who have the wherewithal to make donations.” By identifying these individuals it provides a starting point for the college to focus their fundraising efforts on.

Theme Seven: Cultivate Alumni with Greatest Giving Potential

Once presidents had obtained contact information, their next initiative tended to be to further cultivate relationships with their alumni. There were two initiatives that were described during the interviews. The first initiative was the identification of alumni with the greatest fundraising potential. One president stated that they targeted “alumni that graduated from the college at least 10 years ago.” This approach was directly related to their alumni’s predicted capacity to give larger donations. While other presidents were not as specific on identifying alumni that have graduated 10 years or more, they did indicate that their focus was on communicating with alumni that had the greatest potential to make donations of \$10,000 or more. This was attributed to the limited time

that presidents have in their schedules in addition to the effort involved in cultivating these relationships. One president also stated,

I have had great success in personally targeting four or five alumni each year to develop new scholarships...By inviting alumni to participate in program expansions, or involved in the development of new initiatives it would often lead into a discussion on sponsoring scholarships.

Not all presidents disclosed a specific number of alumni they were targeting each year.

This may have been attributed from my lack of questioning. Reflecting on these comments, I wish I had asked the other presidents if they set similar goals or strategies in the targeting of alumni.

Providing incentives to alumni. The second identified initiative for cultivating alumni focused on providing incentives and recognition to alumni that participate in the alumni association and that make donations to the college. When asked why this is important, the presidents stated “We need to provide alumni with some sort of added benefit if we want them involved in the alumni association.” Some examples of this approach included: creating program specific alumni associations, increasing alumni functions, presenting and publicly displaying outstanding alumni recognition awards, providing career services, and providing memberships to professional development organizations. Presidents further believed that providing these additional services may also encourage alumni to participate in future advisory committees as well. One president also described providing additional services has allowed the college to charge a membership fee. That president stated “We feel we can charge them a membership fee because they are getting a service as a result.” Looking back at these comments, I wish

that I questioned all presidents regarding their thoughts on alumni membership fees. This would have provided greater insight on the collection of alumni membership fees and the potential impact it may have on their alumni associations.

Theme Eight: Foundation Boards have More Connections

One initiative identified by the presidents was to increase their fundraising capacity through the further development of their foundation boards. Their foundation boards have tended to serve as both a direct financial contributor to the colleges, as well as a means of communicating with other potential donors. One president stated “Our foundation staff have significantly improved the selection process for the foundation board and strengthen the relationships with its members.” That president continued to explain,

The people who are on our foundation board have more connections, and better connections. They are very active and they're very passionate about what we're doing. All of those things have combined to really move us from a situation where we were raising \$200,000 or \$300,000 a year to \$800,000, plus now this million-dollar campaign. We've made some significant progress in the last three years, four years.

A similar example was provided by another president who utilized their foundation board members to support academic programs through scholarships and equipment donations because of their relationships with these local businesses.

Theme Nine: Partnership Development Opportunities

One of the most prevalent topics discussed during my interviews with the presidents involved increasing their engagement with business and industries. The presidents indicated that many of their alumni are managers or owners of the business and industries. During my interviews it became obvious that presidents viewed business and industry and their colleges as being in partnerships. Presidents were also keenly focused on their fundraising efforts with business and industry as well. To further describe what fundraising initiatives had been implemented, one president stated “I would not call it fundraising but partnership development opportunities.” While all presidents may not have expressed the same thoughts on this, I felt this comment was the most descriptive summary of the views of all the presidents interviewed.

The second initiative that I found during my interviews focused on presidents’ commitments to revitalize and create new partnerships with businesses and industries. There was a considerable amount of optimism in the presidents’ responses. One president stated,

We have built new centers, and in the centers we created a naming rights process. This benefits both the college by providing them with the essential resources needed as well as the business and industries that benefit from the students who are often trained in these centers as well as the positive community exposure they receive.

Presidents further discussed how new technologies and the increase in demand for highly skilled workers expands the possibilities for developing these partnerships.

The third identified initiative focused on how business and industries have developed partnerships with the donation or consignment of tools and equipment. One president stated “Hundreds of thousands of dollars’ worth of printing supplies come in to the college because of a working partnership with the printing industry.” Several of the presidents stressed the importance of diversifying these partnerships as much as possible. The diversification is necessary to address the ongoing changes in the work environment and the ability to receive such donations on a consistent basis. However, there was a general consensus that opportunities are out there, but they require the time and other resources to be developed adequately.

The fourth initiative involved efforts to increase the success of efforts to obtain challenge grants, innovation grants, and matching grants. One example of this was described as an academic program that was challenged by a local business to raise a certain amount of money to develop a specialized facility for their program. The program took on this challenge and raised the predetermined amount of money through private donations as well as some fundraising events. The president reflected on this as:

It is a way to work with the industry to make something happen that industry wants to see happen. They’re willing to invest; they’re willing to put out the challenge grants, the match grants, whatever it might be to make those things happen.

While this is an example of how these partnerships may be beneficial, presidents also identified barriers that need to be overcome.

Barriers in partnership development. To gain further insights into the development of partnerships with business and industry, presidents’ were asked to

identify any barriers they have or will potentially encounter over the next two years. One barrier identified by a president was the lack of knowledge on how to begin partnerships between the college staff and business and industry managers. As one president stated,

I think sometimes there are corporate sector players and college players who don't know where to begin. They don't know how to form a partnership, and to make them happen. I think that's one barrier, just not knowing how to do that.

Further comments explained that having the knowledge and related systems to facilitate this process is essential to ensuring these relationships can be beneficial for everyone involved.

The second barrier identified by the president was,

Sometimes the demands from the partners on either side can be very challenging or difficult for the other partner entity to work with or deal with. It's not easy and it takes a lot of time. I think those are certainly factors and probably what holds some of those things back a little bit.

Maintaining consistent staffing and documenting the entire process were viewed as key aspects of implementing this process.

The fifth initiative that was identified by presidents was designed to “engage business and industries with worker shortages.” While all the previously listed initiatives could be associated with this initiative, it is listed separately due to the specific targeting of business and industries with worker shortages. As one president who stated “It is these industries that may receive the greatest benefits from their contributions” by allowing colleges to train students to meet their workforce needs. This statement was further

reinforced by a president that stated “business and industries with workforce shortage have been prioritized for acquiring scholarships to offset tuition expenses for full-time students coming into programs with workforce shortages.” This was described as a “priority and a great opportunity” that will have immediate impacts on the community.

Theme Ten: Viability of Fundraising

It is important to recognize that when presidents were asked if they believed fundraising is a viable option to significantly increase revenues at their college, one president commented that “It helps to offset tuition costs incurred by students, but it is not a viable option to offset property taxes, budget reductions, or changes in state funding.” This statement provided a good summary of the other president’s comments as well. Another president expanded on this thought by stating “I think we have to be careful about depending on private contributions to support the public school that we operate.” This sentiment was confirmed by other presidents as well and there appeared to be great concern over the possible impact this would potentially have on publicly funded schools. Publicly funded technical schools were designed to meet the needs of the community they serve, as opposed to independent organizations or contributors.

Additional barriers to fundraising initiatives. One president focused on the lack of sustainability as a barrier. Another president stated “It helps you do things that you may not have been able to do given your funding limits, but it wouldn’t be a revenue stream that we can count on.” Two possible reasons for this were lack of information about where fundraising dollars may come from and when they may arrive. It was apparent that this uncertainty was impacting all presidents’ decisions about creating and implementing fundraising initiatives.

Another barrier identified was that when students continue on to four year institutions, they tend to donate funds to these institutions instead of the technical colleges they attended earlier. To try and overcome this barrier one president stated “We continue to diversify where and how and who we approach for resources and partners that will bring us resources in different kinds of ways.” Another presidents strategy for those students who continue on to other colleges was described as “We need to remind people where their roots were,” referring to where they began their educational career. Doing so, may provide incentives to donate to technical colleges versus the universities they may have most recently attended.

Presidents’ were optimistic regarding their abilities to create initiatives that diversify their potential sources for fundraising resources. The presidents appeared confident in their ability to overcome this barrier. However, there was less optimism and no specific initiatives focused on overcoming the obstacle of students contributing to the other higher education institutions after they have graduated from a technical college. As one president further explained, “I understand why students donate to the institution they obtained their highest degree from. I donate my money to my Ph.D. granting institution, when really my Baccalaureate degree institution is really the one that changed my life.”

Summary

This chapter gives an overview of this study’s findings regarding new fundraising initiatives that have implemented over the past two years, or will potentially be implemented over the next two years at Wisconsin Technical colleges. I grouped the presidents’ comments into themes that best represent the data I obtained from the interviews. I used the presidents’ actual words and comments to best describe the

fundraising initiatives that were discussed during our interviews. The following items summarize the key findings of this study:

- Presidents were committed to the future development of fundraising at their colleges. Despite varying levels of participation, all presidents believed they will dedicate more time focusing on individuals and organizations with the greatest capacity to make large donations to the college.
- Presidents have implemented an initiative that utilizes the telling of stories to communicate the need to further support students through scholarships and resources. A continued effort will be made to share these stories and to further educate the public of the positive impact these donations have on the community. These stories are identified attempts to overcome negative perception in regards to publicly funded education institutions.
- Fundraising may be utilized to help offset costs incurred by students, but it will not offset loss of revenues from county, state, and federal governments. Presidents may need diversify their fundraising approaches to overcome changes and fluctuation in the economic environment.
- Most presidents feel confident in their fundraising team, but had concerns with the future development of key personnel. It is not something that can be taught. Relationship building takes time to establish and will continue to be a challenge for presidents.
- Presidents continued to implement fundraising initiatives focusing on supporting students. By increasing the amount of scholarships given out, creating emergency funds, and the Identification of at risk students who owe small amounts of money,

it was believed the positive impact on the students will ultimately benefit the community and college.

- Fundraising initiatives that focused on producing active alumni included increasing the overall alumni database, targeting of specific alumni, and providing additional incentives for alumni.
- Potential initiatives directed at increasing alumni recognition and incentives included program specific alumni associations, recognition of outstanding alumni recipients, increase alumni functions, access to career services, and increased participation in advisory committees.
- Initiatives presidents have targeted in regards to further partnership development opportunities with business and industry included naming rights, challenge grants, innovation grants, match grants, profit sharing, and consignment of tools and equipment.

Chapter V

Discussion

The purpose of this study is to describe new and potential future fundraising initiatives occurring in Wisconsin Technical Colleges. The study described new fundraising initiatives that Wisconsin Technical Colleges have implemented over the past two years, and initiatives they plan on implementing over the next two years. The research questions for the study are:

1. What new fundraising initiatives have been implemented by Wisconsin Technical Colleges over the previous two years?
2. What potential fundraising initiatives are Wisconsin Technical Colleges planning on implementing over the next two years?

I interviewed seven Wisconsin Technical College presidents and constructed an in-depth description of their experiences with fundraising. While my in-depth description of the Wisconsin Technical College's president's experiences with fundraising does provide insight into current and future fundraising initiatives, it may not be representative of all technical college presidents.

Summary of Findings

This section will discuss the implications of this study's findings. A description of each of the findings along with a comparison of past literature will be addressed in this section.

A great story to tell. A significant finding from this study revealed that presidents often utilize the telling of stories to draw attention to the direct need for student scholarships. As one president stated "people just don't know" the importance

and need for additional scholarships to support students. According to Shaw and Shaw (2008), it is critical for presidents' to share their visions and to obtain a total buy-in from trustees, administrators, faculty, staff, alumni, students, and community stake holders. Additional literature identified the importance of utilizing marketing personnel for increasing fundraising success (Stevick, 2010). Presidents have tended to use personalized stories of both students and organizations to describe this vision and to prove the importance of donations to support student scholarships. However, it was not apparent that presidents researched and identified those stories that would have the most beneficial impact on their fundraising efforts. Utilizing marketing personnel to identify those stories that will have the greatest impact on the intended audience, may enable presidents to build stronger relationships to effectively convince individuals to make donations.

Perception of publicly funded institutions. One major challenge that presidents have encountered in their communities was the perception that publicly funded institutions were not in need of additional funds or that funds would be used to offset operational expenses. This sentiment is further explained by an ASHE Higher Education Report (2011), which recognized the differences in policies related to the philanthropic support of public or privately funded higher education institutions. Presidents continue to utilize stories to further explain their vision to individuals and how their primary fundraising efforts are to provide student scholarships and ultimately having a profound impact on the overall community. This has been described as being very effective, but also is extremely time consuming for presidents.

According to Shaw and Shaw (2009), these presidents need to justify their need for additional funds and share how these funds will be used to achieve the colleges as well as the communities' visions. I would recommend further efforts to educate the masses of people either verbally or through other technological communications about the growing need for student scholarships and the positive impact such contributions will have on local communities. Prioritizing large social gatherings as venues in which to tell their stories, will allow the president to target greater numbers of individuals to reduce the amount of one-on-one time they will need to spend with potential individual donors. Presidents may also consider training additional staff to further relate these stories to a wide array of populations. According to Hodson (2010), the research also supports the notion that fundraising is the responsibility of a wide group on institutional leaders.

Alumni fundraising. Historically, alumni fundraising has not been viewed as a necessity at two year colleges (Glass & Jackson, 1998). However, alumni gifts at two year colleges has increased, as a percentage of all gifts, from 3.4% in 2008 to 5.8% in 2009 (Kaplan, 2010). This study revealed that presidents are either developing or continuing to re-evaluate their current approaches to alumni fundraising. Five of the seven presidents indicated they have created initiatives over the past two years to develop active alumni primarily through the development of their alumni associations. The initiatives focused on the identification and communication with alumni by further developing their alumni databases. The development of these alumni databases was often described as in the development stage. A sense of optimism and commitment to the further development of alumni fundraising initiatives was displayed in addition to a level of uncertainty on how to best develop these initiatives. Previous research indicated two

year colleges may benefit from implementing practices that other higher education institutions have previously developed (Skari, 2010). The most recent trends in the literature suggest the need for institutions to focus their efforts on cultivating alumni (Jones, 2010; Satterwite, 2004; Shepard, 1996; Skari, 2011).

Cultivation of alumni. According to Shepard (1996), the cultivation of alumni involves the following three steps. The first step requires institutions to identify and determine the capacity of potential donors. This study revealed that each president will need to first determine if they have an adequate database to identify alumni. While, several presidents' expressed not having any difficulty in locating alumni, other presidents' shared concern over the challenges they had encountered in locating alumni. The primary means to identify alumni was through internal resources such as their alumni associations, alumni foundations, or by the utilization of private organizations that specialize in the identification and location of college alumni.

Identify alumni with greatest giving capacity. Once presidents determine the alumni data has been sufficiently compiled, the need to refine and identify the characteristics of alumni who have the greatest capacity to donate may begin. This may be accomplished by the utilization of tools such as predictive models. Weerts and Ronca (2009) developed a classification tree to predict alumni giving for higher education institutions. According to Weerts and Ronca (2009), obtaining a greater understanding of alumni donor characteristics in comparison to their giving levels, may enable institutions to target and cultivate their alumni with the greatest giving potential. It is not entirely certain the application of this tool may be applied effectively with technical college alumni. However, if this approach works for other higher education institutions, it may

also allow the presidents of technical colleges to prioritize their fundraising efforts, saving both time and money for these institutions.

Develop strategic plan. The second step is to develop a strategic plan to cultivate alumni donors (Shepard, 1996). As is the case with most higher education institutions, this study revealed the presidents may need to reevaluate their approach with key donors and look for opportunities to improve upon their current practices. Presidents shared several future initiatives directed at further cultivating alumni. These initiatives were explained as the development of program specific alumni associations, increased recognition of outstanding alumni recipients, increased alumni functions, the offering of career services to all alumni, and the increased participation of alumni in advisory committees. Based on the diverse nature of these technical colleges and the communities they serve, each president should develop their own strategic plan to ensure they meet both donors' and institutions' goals (Glass & Jackson, 1998; Shaw & Shaw, 2008). An annual evaluation of the strategic plan will allow presidents to continuously reevaluate and address any issues that may need updating.

Communicate with alumni. The third step is to effectively communicate with alumni (Shepard, 1996). The ability to communicate with alumni was identified as having the greatest potential in alumni fundraising (Dolbert, 2002). Methods often utilized by higher education institutions to communicate with alumni include personal communications, emailing, social networking sites, press publications, and social events. The results of this study indicated that presidents may benefit from developing formal systems for identifying and tracking of communications between the colleges and their key donors. While I firmly believe the presidents do an exceptional job when asked to

engage in these interactions, they may benefit from the implementation of a formal system to track who has been contacted, what was discussed or promised, and when used what type of future communications should take place. The sharing of these data between the key fundraising personnel and the presidents is critical to the overall success of their fundraising efforts (Hodson, 2010; Glass & Jackson, 1998; Satterwite, 2004; Stevick, 2010). More highly structured approaches will enable presidents and their staff to set specific communication goals and dedicate time in their schedules to communicate more effectively with key donors.

Confidence in fundraising team. Most presidents described a high level of confidence in their current fundraising teams. According to Thomas (2008), when community colleges dedicated one full-time person to manage their fundraising efforts, they were more successful in their fundraising efforts. The majority of presidents also indicated they felt they had adequate staffing to accomplish their fundraising initiatives. However, this study found that presidents do have concerns over possible retirements and their potential replacement of key fundraising personnel over the next two years. Several presidents indicated that the skills that have allowed their current staff to be successful may be difficult to find in replacement staff. Personal interactions with donors and the establishment of trusting relationships often require time to establish. While the transition of staff is often difficult for organizations, presidents may also need to consider increasing staffing levels or alternative practices to overcome the potential loss of donations due to staff turnover or retirements. According to Stevick (2010), several actions may assist presidents' efforts to cope with such changes. Having job descriptions that are directly linked to the mission statement will help identify individuals that are

qualified for the position. The creation on interdisciplinary teams that train and work together will provide greater flexibility. Lastly, applying a customer relationship management strategies, such as pairing inexperienced fundraising staff with key fundraising personnel during meetings may also provide greater success in fundraising.

Educational conferences. Presidents clearly indicated that they intend to continue sending fundraising personnel in addition to themselves to educational conferences that discuss fundraising strategies. This was viewed as the primary method for obtaining future trends in fundraising. According to Brennan (2005), there is a demand to develop specialized courses to prepare college presidents. With limited literature focused on fundraising at technical colleges, the presidents felt educational conferences provided the best opportunity to identify strategies that were most appropriate for their institution. It may also be beneficial for presidents to seek out alternative training programs that specialize in philanthropy and non-profit fundraising. These disciplines are well established and may offer alternative approaches to fundraising not covered by their current selection of conferences and training sessions.

Continue to expand on building relationships with businesses and industries. The main foci of two year college programs are to meet the local needs and to promote local economic development of their communities (Hall, 2002). This may provide opportunities to develop strong personal ties between college personnel and local executives (Ryan & Palmer, 2005). The majority of presidents indicated they have created initiatives focused on the development of partnerships with business and industry.

Diversifying fundraising efforts. The presidents stressed the importance of diversifying their fundraising efforts to increasingly diverse groups of business and

industry's. Such diversification could allow colleges to overcome fluctuations and the willingness of business and industry to make financial contributions due to the current state of the economy. Diversified efforts also allows colleges to engage business and industries that have worker shortages that may be effectively addressed by such partnerships. Some initiatives that presidents successfully targeted included: naming rights, challenge grants, innovation grants, match grants, profit sharing, and consignment of tools and equipment. It appears that these presidents tend to use many of the same partnership initiatives adopted by other higher education institutions. However, with no related data, it is not known to what degree technical colleges are acquiring fundraising partnerships with business and industries. It also is not clear what actions have successfully resulted in such donations.

Barriers presidents encountered. While presidents explained their successes in the creation of these initiatives, they also disclosed several of the barriers that will need to be overcome. These barriers include a time consuming process involved in the negotiation of these initiatives, no immediate return of investment, lack of knowledge on how the development of these initiatives occurs, and change in organizational personnel create issues with communication. While no specific strategies to overcome these barriers were disclosed, presidents indicated they were utilizing their fundraising personnel to overcome these barriers on a case by case basis. According to Ryan and Palmer (2005), presidents should also consider implementing strategies in which "one source of funding leads naturally to another" (p. 47). This may assist in overcoming many of the barriers presidents have encountered with new partnerships. Presidents clearly believed that

potential fundraising partnerships have been well worth the effort and that they will continue to pursue initiatives directed at partnerships with business and industries.

Implications for Policy

- A continued effort to identify, communicate, and cultivate alumni may increase overall success of technical colleges' fundraising efforts. The utilization of predictive models may assist in the identification of alumni with the greatest giving potential. By focusing on these alumni, it will potentially increase alumni giving and reduce the amount of resources necessary to obtain donations.
- Continue to focus on identifying stories that will have the most profound impact on their fundraising efforts. The utilization of marketing personnel may be necessary to accomplish this. While all presidents utilize stories to spread their message, it is unclear if the stories they are telling are having the greatest amount of impact on their targeted audiences. It may also assist in determining which method of delivering these stories is most appropriate for each audience as well.
- Additional staffing and resources may be necessary to increase potential fundraising. Universities dedication of significant amounts of time and resources have generated large donations. Technical college presidents also need to further explain how fundraising is a long-term investment. Fundraising does not often yield immediate financial gains. By devising strategies which allow time for fundraising personnel to build relationships, the possibility of increasing their fundraising donations may increase.

Implications for Research

- Research is needed to identify effective/efficient fundraising strategies for technical colleges.
- Further research is necessary to design standardized processes for reporting fundraising revenues at technical colleges. While fundraising data for universities is collected annually, there currently is no system specifically designed for technical colleges to share their data. It is not to say these data does not exist. Technical college foundations often prepare annual reports but there are no broadly used methods for collecting or reporting these data. Thus, it is almost impossible to compare and contrast existing data across technical colleges. This study has confirmed that presidents found it difficult to estimate how successful their fundraising efforts really were in comparison to institutions that would be comparable to their college. Collecting data related to the estimated revenues and solicitation of good and services at other technical colleges, would enable presidents to better evaluate the effectiveness of their current fundraising practices.
- Further research is needed to identify key characteristics of donors to technical colleges. By identifying these characteristics, the president may be able to further concentrate and improve their efforts with such individuals.
- Further research is needed to identify the cost/benefit outcomes of fundraising. By identifying the costs/benefits of fundraising, presidents may be able to further justify the impact these revenues have on students and communities.

Implications for Practice

- One of the keys to potentially increasing the fundraising success of the technical colleges will be identifying alumni that are most likely to make large donations. By identifying these alumni it will allow presidents to focus on the development of strategies to further encourage these relationships the likelihood of receiving large donations.
- Continued expansion of efforts to build new/better relationships with businesses and industries are needed. While these partnerships often take a considerable amount of time to establish, they may provide significant financial revenues to the technical colleges. Presidents may need additional staffing to allow their colleges to better establish these partnerships. It is important that the necessary personnel and financial resources be allocated to develop these relationships and to ensure that they are addressing both institutional, as well as the business and industry needs.
- Presidents may consider additional education and training strategies in regards to future fundraising initiatives to maximize their fundraising potential. As presidents indicated their time spent fundraising will likely increase in the future. Their schedules will continue to become increasingly difficult to manage. Further appropriate training may provide presidents with the specific knowledge and skills utilized effectively by other higher education institutions and thus, enable them to maximize their time to donations received.

Closing remarks

I would like my research to be of value to higher education administrations as well as organizations that rely on fundraising to achieve success. I am optimistic this research can bring an improved understanding on the potential impact fundraising may have on higher education institutions and especially technical colleges. It is also my hope the presidents that participated in the interviews will benefit from this study.

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